

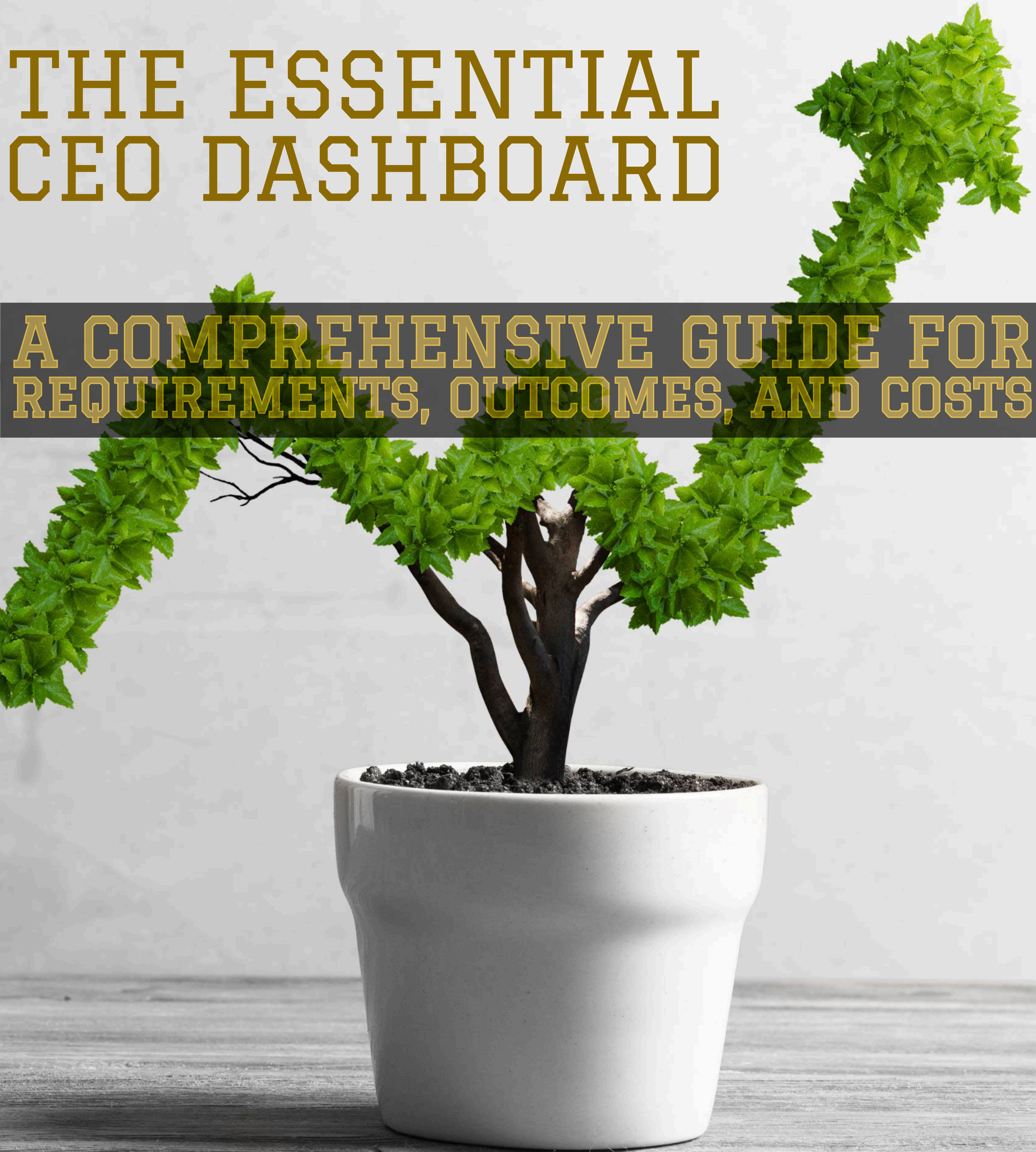


**OAZ SHAKTI**  
SHINE WITH INTEGRITY & QUALITY

ER. MANISH GARG

# THE ESSENTIAL CEO DASHBOARD

A COMPREHENSIVE GUIDE FOR  
REQUIREMENTS, OUTCOMES, AND COSTS



OAZ SHAKTI BUSINESS SOLUTIONS AND TECHNOLOGIES

# The Essential **CEO Dashboard**

A Comprehensive Guide for  
Requirements, Outcomes, and Costs

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**OAZ SHAKTI BUSINESS SOLUTIONS &  
TECHNOLOGIES**



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# OAZSHAKTI BUSINESS SOLUTIONS & TECHNOLOGIES



**Microsoft:**

*"With Power BI, we were able to visualize and analyze our data in ways we never thought possible. It has truly transformed how we make decisions and manage our business."*

— Satya Nadella, CEO, Microsoft

**Siemens:**

*"Implementing dashboards has streamlined our reporting process and provided our teams with real-time insights. This has enabled us to be more proactive and strategic in our operations."*

— Lisa Davis, CTO, Siemens

**Amazon:**

*"Dashboards have revolutionized our ability to monitor performance and identify trends across our vast array of services. They are an indispensable tool for our business."*

— Andy Jassy, CEO, Amazon Web Services

**General Electric:**

*"Using dashboards has allowed us to bring all our data together in a unified view, enabling better decision-making and operational efficiency. It's a game-changer for us."*

— Jeffrey Immelt, Former CEO, General Electric

- VOICE OF INDUSTRY LEADER'S

**Coca-Cola:**

*"Dashboards give us the power to visualize data from multiple sources in a single, easy-to-understand format. This has improved our marketing strategies and helped us understand our customers better."*

— James Quincey, CEO, Coca-Cola

**Nestlé:**

*"The implementation of dashboards has enhanced our ability to track and manage inventory, optimize supply chain processes, and drive sales growth. They have become a crucial part of our daily operations."*

— Ulf Mark Schneider, CEO, Nestlé

**Procter & Gamble:**

*"Dashboards provide us with the insights we need to innovate and stay ahead in a competitive market. They enable us to see the full picture and make data-driven decisions quickly."*

— David Taylor, CEO, Procter & Gamble

- VOICE OF INDUSTRY LEADER'S

**Dashboard** is a handy and essential tool that can be used in a **General Store** to any **Established Company / Organization**.

**Dashboards** are the basic need in **today's scenario**, for one who want to **excel** in their **field**.

- OAZSHAKTI BUSINESS SOLUTIONS AND TECHNOLOGIES

# Words From Author

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This Guide outlines the requirement, process, expected outcomes, tools, techniques, costs, ROI, and payback period for implementing a CEO dashboard in any company.

In this we have considered that dashboard will cover the departments such as HR, Accounts & Finance, Presales, Sales & Marketing, Projects, Recruitment, and IT & Admin. (These are just for understanding of the concept of CEO Dashboard not limited to the numbers of departments in your company).

In this guide we have taken two scenarios

- For understanding the requirement by a case example of a general store.
- For getting a detail understanding a case of an established company.

# Overview

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## What is a CEO Dashboard?

A CEO Dashboard is a tool that helps you see important information about your business in one place. Imagine it like the dashboard of your car, showing you the speed, fuel level, and other important details. A CEO Dashboard does the same for your business, showing key information about different departments like HR, Finance, Sales, and more.

## Why is a CEO Dashboard Important?

Without a CEO Dashboard, managing a business can be overwhelming. You might be dealing with:

- **Manual Reports:** Spending hours gathering and calculating data from different sources.
- **Missed Opportunities:** Not spotting trends or problems quickly enough to take action.
- **Lack of Insights:** Struggling to see the big picture and make informed decisions.

A CEO Dashboard solves these problems by giving you real-time, easy-to-understand insights into your business. This helps you:

- **Save Time:** Automate data collection and reporting.
- **Make Better Decisions:** See trends and patterns at a glance.
- **Improve Performance:** Track key metrics and take action quickly.



# Why CEO Dashboard – in a CEO's prospective

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In today's competitive landscape, companies need to leverage data-driven insights to make strategic decisions effectively. A CEO or managing authority often faces challenges in decision-making due to gaps in data visibility, process inefficiencies, and the lack of integrated tools. In this guide we have tried to provides a detailed analysis of the common issues faced by CEOs, identifies gaps in current processes, and explores the implementation of a robust CEO Dashboard to address these challenges.

# Challenges Faced by CEO's

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## 1. Data Visibility and Integration

- **Issue:** CEOs struggle with scattered data sources, making it difficult to get a comprehensive view of the company's performance.
- **Impact:** Limited visibility leads to delayed decision-making and inefficiencies in tracking key performance indicators (KPIs).

## 2. Inefficient Reporting Processes

- **Issue:** Manual and inconsistent reporting processes result in time-consuming efforts and potential inaccuracies.
- **Impact:** Delays in report generation hinder timely decision-making and can affect overall strategic planning.

## 3. Lack of Real-time Insights

- **Issue:** Many organizations rely on historical data, which may not reflect current operational realities.
- **Impact:** CEOs may base decisions on outdated information, leading to missed opportunities and reactive rather than proactive management.

## 4. Difficulty in Analysing Key Metrics

- **Issue:** Analysing complex data sets and deriving actionable insights can be challenging without a dedicated tool.
- **Impact:** Inadequate analysis can result in poor strategic decisions and missed business growth opportunities.

## 5. Process Inefficiencies

- **Issue:** Inefficient processes and manual workflows can lead to errors and delays.
- **Impact:** Reduced operational efficiency and increased risk of operational bottlenecks.

# Identifying Gaps in Current Processes

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## 1. Lack of Centralized Data Management

- **Gap:** Data is often stored in disparate systems without a unified platform for aggregation.
- **Recommendation:** Implement a centralized data management system to consolidate data from various sources.

## 2. Inadequate Visualization and Reporting Tools

- **Gap:** Existing tools may lack advanced visualization features and customizability.
- **Recommendation:** Adopt a comprehensive dashboard tool that provides customizable reports and interactive visualizations.

## 3. Limited Real-Time Data Access

- **Gap:** Data is not updated in real-time, leading to outdated information.
- **Recommendation:** Integrate real-time data streaming into the dashboard to ensure up-to-date insights.

## 4. Manual Data Analysis

- **Gap:** Data analysis is performed manually, increasing the likelihood of errors.
- **Recommendation:** Utilize advanced analytics and automation features to streamline data analysis and reporting.

# Recommended Tool for CEO Dashboard Implementation

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## Tool Selection Criteria

- **Integration Capabilities:** Ability to integrate with existing data sources and systems.
- **Customization:** Options for customizing dashboards and reports to suit specific business needs.
- **Real-Time Data Access:** Support for real-time data streaming and updates.
- **Advanced Analytics:** Features for advanced data analysis, including predictive analytics and machine learning.
- **User-Friendliness:** Intuitive interface and ease of use for non-technical users.
- **Scalability:** Ability to scale as the organization grows and data volume increases.

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## Recommended Tool: Microsoft Power BI

# Why Microsoft Power BI

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Microsoft Power BI is a comprehensive business intelligence tool that allows for data visualization, interactive reporting, and advanced analytics. It integrates seamlessly with various data sources and provides real-time insights through its interactive dashboards.

## Key Features

- **Data Integration:** Connects with multiple data sources, including databases, spreadsheets, and cloud services.
- **Customizable Dashboards:** Allows for the creation of tailored dashboards and reports to meet specific business needs.
- **Real-Time Data Updates:** Supports real-time data streaming and automatic updates.
- **Advanced Analytics:** Includes features such as Power Query for data transformation and DAX for advanced calculations.
- **User-Friendly Interface:** Intuitive design with drag-and-drop functionality for ease of use.
- **Scalability:** Handles large data volumes and complex datasets efficiently.

# CEO Dashboard

For A

## General Store

Case Scenario



# General Store A Case Scenario

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## How a CEO Dashboard Helps In Business

Let's look at an example of a general store to illustrate the benefits.

### Before a CEO Dashboard:

- 1. Sales Tracking:** The owner manually tracks sales in a notebook, making it hard to see which items are selling well.
- 2. Inventory Management:** Stock levels are checked manually, leading to overstock or running out of popular items.
- 3. Expense Monitoring:** Keeping track of expenses is done by hand, making it difficult to control costs.
- 4. Customer Insights:** The owner has no way to see customer buying patterns.

# General Store A Case Scenario

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## After Implementing a CEO Dashboard:

### 1. Automated Sales Tracking:

- **Before:** Monthly sales were inconsistent, averaging ₹1,00,000.
- **After:** Sales data is tracked automatically, showing best-selling items. Sales increase to ₹1,20,000 per month.
- **Annual Sales Increase:** ₹2,40,000.

### 2. Efficient Inventory Management:

- **Before:** ₹50,000 lost annually due to stockouts and overstocking.
- **After:** The dashboard alerts when stock is low. Losses reduce to ₹10,000.
- **Annual Savings:** ₹40,000.

### 3. Expense Control:

- **Before:** Total annual expenses were ₹6,00,000.
- **After:** Dashboard identifies areas to cut costs, reducing expenses to ₹5,40,000.
- **Annual Savings:** ₹60,000.

### 4. Enhanced Customer Insights:

- **Before:** No targeted promotions.
- **After:** Dashboard shows customer preferences, increasing sales by ₹10,000 per month.
- **Annual Sales Increase:** ₹1,20,000.

**Total Annual Benefit:**  
**₹4,60,000**



# CEO Dashboard

For An

**Established Company /  
Organization**

Case Scenario



# Setting Scenario

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For understanding in detail for the requirement and implementation plan let's consider again a scenario of an established organization without using the CEO Dashboard:

## 1. Overview of the Company

- **Industry:** Any
- **Company Size:** Medium to Large
- **Location:** Multiple regional offices
- **Primary Services:** Engineering design, project management, consulting, and outsourcing solutions for various engineering disciplines, etc..

## 2. Current Business Environment

- **Operational Structure:**
  - **Decentralized Operations:** Various departments operate semi-independently across different locations, leading to a lack of uniformity in reporting and data management.
  - **Varied Data Sources:** Data is scattered across multiple systems including ERP, CRM, project management tools, and spreadsheets. Integration between these systems is minimal.
  - **Manual Processes:** Many processes are manual, including data collection, reporting, and analysis, resulting in inefficiencies and delays.

# Setting Scenario

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- **Management Reporting:**

- **Reports Generation:** Reports are generated manually by compiling data from different sources, leading to inconsistencies and errors.
- **Frequency:** Reports are typically generated on a weekly or monthly basis, making it difficult for the CEO to get real-time insights into business performance.
- **Format:** Reports are often in static formats (e.g., PDFs, Excel sheets) which are not interactive or easily customizable.

### 3. Challenges Faced

- **Data Accessibility and Quality:**

- **Data Silos:** Information is stored in disparate systems with limited integration, making it challenging to get a comprehensive view of the company's performance.
- **Data Accuracy:** Manual data entry and integration issues have led to frequent discrepancies and inaccuracies in reports.
- **Real-time Data:** Lack of real-time data makes it difficult to make timely decisions or respond to emerging issues.

- **Decision-Making Process:**

- **Delayed Insights:** The time lag in data reporting means that the CEO often has outdated information, which hampers decision-making and strategic planning.
- **Limited Analytical Capability:** Existing reports offer limited analytical capabilities, making it hard to perform in-depth analysis or identify trends and patterns.
- **High Dependency on IT:** Generating custom reports or extracting specific data often requires IT intervention, leading to delays and bottlenecks.

# Setting Scenario

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- **Strategic Alignment:**
  - **Inconsistent Metrics:** Different departments use varying metrics and KPIs, leading to inconsistencies in reporting and difficulty in aligning strategic goals.
  - **Lack of Visualization:** Existing reports lack interactive visualizations, making it hard to interpret complex data and derive actionable insights.
- **Operational Efficiency:**
  - **Manual Work:** Significant time is spent on manual data collection, validation, and report generation, reducing overall productivity.
  - **Error-Prone:** Manual processes increase the likelihood of errors, which can impact decision-making and lead to operational inefficiencies.

# Setting Scenario

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## 4. Stakeholder Concerns

- **CEO:**
  - **Need for Real-time Insights:** Requires immediate access to comprehensive, up-to-date information to make informed strategic decisions.
  - **Desire for Interactive Dashboards:** Prefers visual and interactive dashboards that offer drill-down capabilities and customizable views.
- **Department Heads:**
  - **Request for Unified Reporting:** Seek a unified reporting system that integrates data from various departments for consistent and accurate reporting.
  - **Need for Performance Metrics:** Desire a standardized set of performance metrics that align with company goals and facilitate cross-departmental comparisons.
- **IT Department:**
  - **Challenges with Data Integration:** Faces difficulties integrating data from multiple sources and ensuring data quality.
  - **High Maintenance:** Manual reporting systems require ongoing maintenance and support, consuming valuable IT resources.
- **Finance Team:**
  - **Accuracy of Financial Reports:** Concerned about the accuracy and timeliness of financial reports, which impact budgeting and forecasting.
  - **Efficient Budget Tracking:** Needs better tools for tracking budgets, expenditures, and financial performance in real-time.

# Setting Scenario

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## Assumptions

1. **Data Availability:** All necessary data from various departments are available and accessible.
2. **Single Resource:** One senior analyst with proficiency in Excel and Power BI will handle the entire project.
3. **Stakeholder Support:** Key stakeholders are available for consultations and approvals.
4. **Technology Stack:** The company has or will obtain necessary licenses for Power BI, Excel, and other required software.
5. **Training Participation:** End-users will actively participate in training sessions.
6. **Initial Data Quality:** The data collected is of sufficient quality to support accurate analysis and visualization.
7. **Complexity:** The complexity of the project is rated at 8 out of 10.
8. **Analyst Expertise:** The analyst is well-versed and has exposure to the domain or industry.
9. **Daily Working Hours:** The analyst will work for 8 Hours a Day.
10. **Cost Considered:** The analysts charges per day considered as bellow for each estimated scenario

Particulars / Scenario	Low Estimate	Mid-Level Estimate	High Estimate
Per Hour Analyst Charges	25\$	35\$	45\$

# Process Map for Building a CEO Dashboard

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## 1. Initial Consultation and Requirements Gathering

- Meet with the CEO and key stakeholders to understand their requirements and goals.
- Identify key metrics and KPIs for each department: HR, Accounts & Finance, Presales, Sales & Marketing, Projects, Recruitment, IT & Admin.

## 2. Data Collection and Preparation

- Collect data from various sources including Excel files, Google Sheets, and local databases.
- Clean and preprocess the data to ensure accuracy and consistency.

## 3. Data Analysis and Modeling

- Use Power BI Desktop to import the data.
- Create data models to link various data sources and establish relationships.

## 4. Dashboard Design and Development

- Design the dashboard layout considering user experience and ease of use.
- Develop interactive visualizations for different KPIs using Power BI.

# Process Map for Building a CEO Dashboard

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## 5. Integration and Automation

- Integrate Power BI with local servers and other data platforms via APIs.
- Automate data refreshes and updates to ensure real-time data availability.

## 6. Testing and Validation

- Test the dashboard with sample data to ensure accuracy.
- Validate the results with stakeholders and make necessary adjustments.

## 7. Deployment and Training

- Deploy the dashboard to the CEO and relevant departments.
- Conduct training sessions for end-users to ensure they can effectively use the dashboard.

## 8. Ongoing Support and Maintenance

- Provide ongoing support to address any issues and make improvements.
- Regularly update the dashboard based on feedback and new requirements.



# Expected Outcomes After Implementation

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## 1. Improved Decision-Making:

- The CEO and management will have real-time access to key metrics.
- Data-driven decisions will lead to better business outcomes.

## 2. Increased Efficiency:

- Streamlined reporting processes will save time and reduce manual efforts.
- Automation will minimize errors and improve accuracy.

## 3. Cost Savings:

- Identifying and eliminating inefficiencies will lead to cost reductions.
- Better resource management will optimize operational costs.

## 4. Revenue Growth:

- Enhanced visibility into sales and marketing metrics will boost revenue.
- Identifying new business opportunities will drive growth.

# Tools and Techniques to be Utilized

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## 1. Data Collection Tools:

- **Excel:** For initial data collection and preprocessing.
- **Google Sheets:** For collaborative data collection.
- **SQL Databases:** For accessing structured data from local servers, ERP, CRM, etc..

## 2. Data Preparation and Analysis Tools:

- **Power BI Desktop:** For data modeling, analysis, and visualization.
- **Excel:** For data cleaning and initial analysis.

## 3. Integration Tools:

- **Power BI Dataflows:** For integrating data from various sources.
- **API Integrations:** For connecting Power BI with other data platforms and local servers.

## 4. Visualization Techniques:

- **Interactive Dashboards:** For real-time data visualization.
- **Custom Visuals:** For specific KPIs and metrics.

# Tools and Techniques to be Utilized

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## 5. Automation Tools:

- **Power BI Scheduled Refresh:** For automated data updates.
- **Power Automate:** For workflow automation.

## 6. Testing and Validation Techniques:

- **User Acceptance Testing (UAT):** To ensure the dashboard meets stakeholder requirements.
- **Data Validation:** To verify the accuracy of the data.

## 7. Training and Support Methods:

- **Hands-on Training Sessions:** To ensure end-users can effectively use the dashboard.
- **Documentation:** Providing user guides and manuals.
- **Ongoing Support:** Regular check-ins and support to address issues and enhancements.

# Work Process

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## 1. Data Collection:

- Gather data from various sources such as Excel, Google Sheets, and local databases.

## 2. Data Preparation:

- Clean and preprocess the data using Excel and Power BI's data transformation tools.

## 3. Data Modeling:

- Import the data into Power BI Desktop.
- Create relationships between different datasets to build a comprehensive data model.

## 4. Visualization:

- Design and create interactive visualizations and dashboards in Power BI Desktop.
- Use Power BI's built-in features to enhance the visual appeal and functionality.

## 5. Integration:

- Connect Power BI to local servers and other data platforms using APIs.
- Ensure seamless data flow and real-time updates.

## 6. Automation:

- Set up automated data refresh schedules in Power BI to keep the dashboard up-to-date.
- Use Power BI's integration capabilities to automate workflows.

# Expected Time to Implement the Whole Process

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Considering only one person will handle all activities, the estimated time to complete the entire process is approximately 25 weeks.

Activity	Estimated Time
Initial Consultation	2 weeks
Data Collection and Preparation	4 weeks
Data Analysis and Modeling	5 weeks
Dashboard Design and Development	6 weeks
Integration and Automation	4 weeks
Testing and Validation	2 weeks
Deployment and Training	2 weeks
Ongoing Support and Maintenance	Continuous

# Expected Cost, ROI, and Payback Period Calculation

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Using different hourly rates: (Considering as on day rate conversion 104.65 INR/\$)

Estimate	Low	Mid-Level	High
Per Hour Cost	₹2,616	₹3,662.75	₹4,709.25
Total Hours	1,000 hours	1,000 hours	1,000 hours
Total Cost	₹2,616,000	₹3,662,750	₹4,709,250
Training & Initial Support	₹150,000 - ₹375,000	₹150,000 - ₹375,000	₹150,000 - ₹375,000
Ongoing Support (Annual)	₹375,000/year	₹375,000/year	₹375,000/year
Total Initial Investment	₹2,766,000 - ₹2,991,000	₹3,812,750 - ₹4,037,750	₹4,859,250 - ₹5,084,250
Total Annual Benefits	₹4,000,000	₹4,000,000	₹4,000,000
Ongoing Costs	₹375,000	₹375,000	₹375,000
Net Annual Benefits	₹3,625,000	₹3,625,000	₹3,625,000
ROI (First Year)	31.05%	-4.93%	-25.42%
Payback Period	0.76 years	1.05 years	1.34 years

# Expected Cost, ROI, and Payback Period Calculation

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## Notes:

- **ROI** is calculated as:  $((\text{Net Annual Benefits} - \text{Total Initial Investment}) / (\text{Total Initial Investment})) \times 100$
- **Payback Period** is calculated as:  $(\text{Total Initial Investment} / \text{Net Annual Benefits})$

## Assumptions Considered for Calculation of Total Annual Benefits

### 1. Increased Efficiency:

- **Assumption:** Implementation of the dashboard saves 100 hours per month of manual reporting efforts.
- **Hourly Rate:** ₹1,000 (for calculation purposes)
- **Annual Savings:** 100 hours/month × 12 months × ₹1,000/hour = ₹1,200,000

### 2. Cost Savings:

- **Assumption:** Reduction in operational inefficiencies saves ₹500,000 annually.

### 3. Revenue Growth:

- **Assumption:** Enhanced sales and marketing insights lead to an increase in revenue by ₹2,300,000 annually.

# Expected Cost, ROI, and Payback Period Calculation

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## **Total Annual Benefits Calculation:**

Total Annual Benefits = Increased Efficiency + Cost Savings + Revenue Growth

Total Annual Benefits = ₹1,200,000 + ₹500,000 + ₹2,300,000 = ₹4,000,000

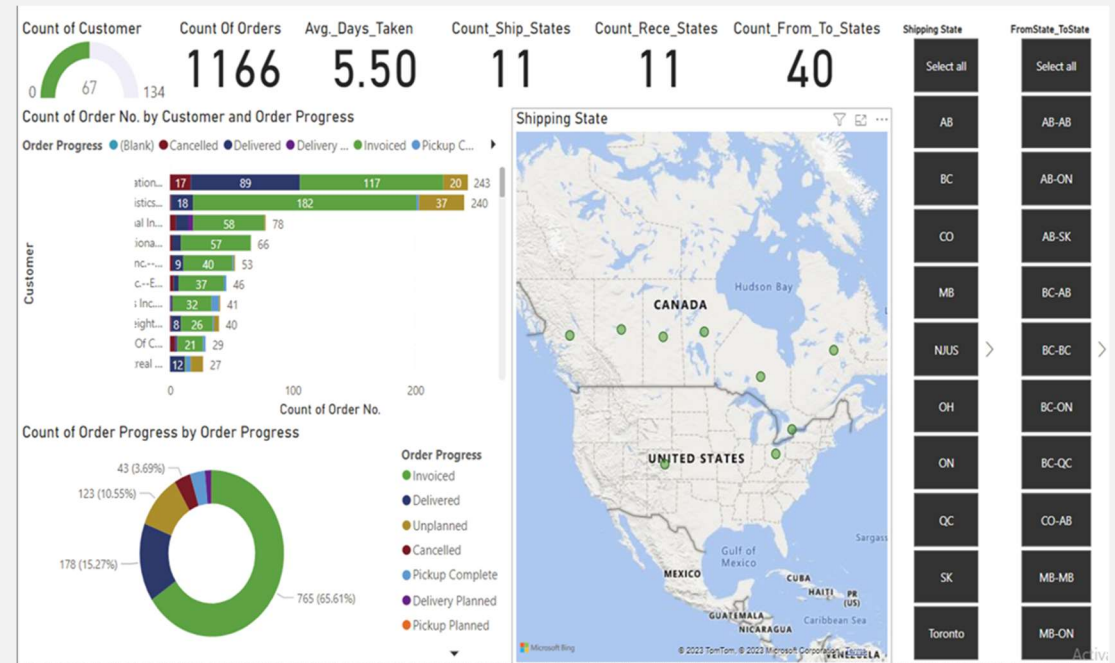
This calculation assumes that the dashboard will lead to tangible improvements in efficiency, cost savings, and revenue generation, and these estimates are based on projected impacts and historical data or assumptions.



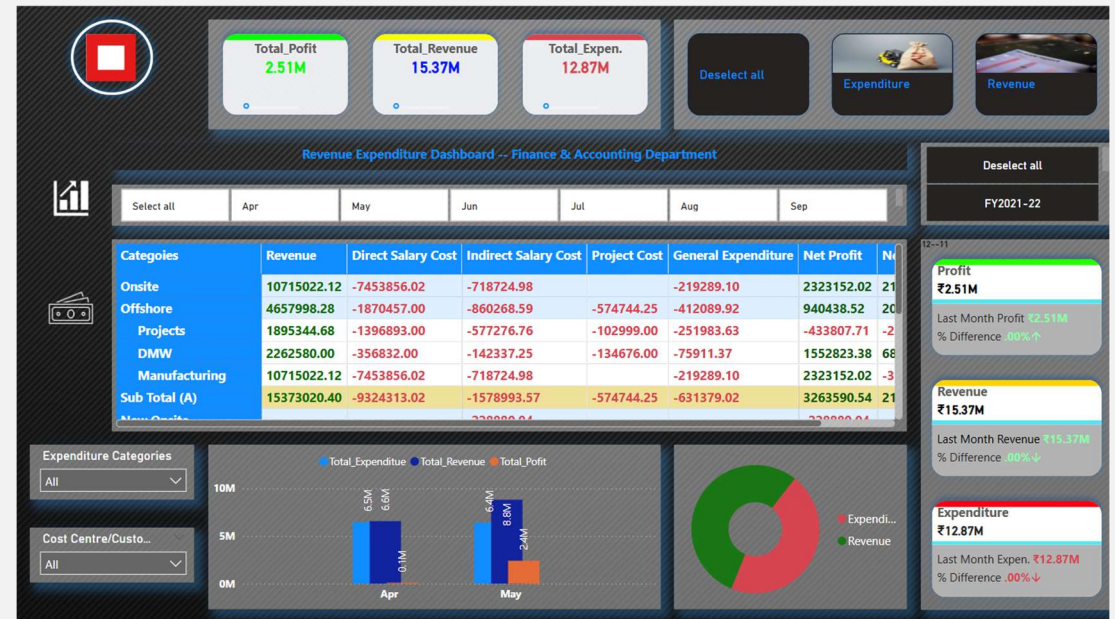
# Sample Dashboard S



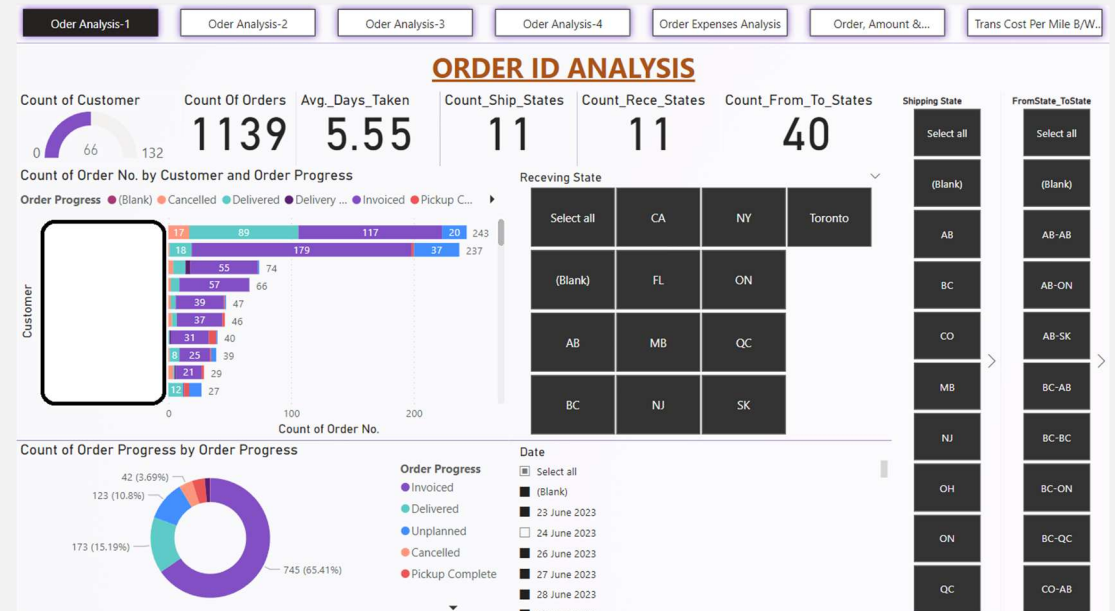
# Sample Dashboards-1



# Sample Dashboards-2



# Sample Dashboards-3



# Conclusion

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In today's fast-paced business environment, staying ahead of the competition requires more than just intuition and experience—it demands real-time, data-driven insights. Dashboards are no longer a luxury but a necessity for CEOs who aim to lead their organizations to success.

**Take Action on Time:** As demonstrated by industry leaders, the strategic implementation of dashboards can transform your decision-making process, enhance operational efficiency, and provide a clear, unified view of your business's performance. Whether it's optimizing your supply chain, understanding customer behaviour, or innovating new products, dashboards empower you to make informed decisions swiftly and confidently.

Embrace the power of dashboards to unlock the full potential of your data. By doing so, you not only gain a competitive edge but also position your company for sustainable growth and innovation. Don't wait—**take action on time** and lead your business into a future of limitless possibilities.

**Start your dashboard journey today and transform the way you do business!**